

# MERCER PUBLIC WORKSHOP

## 美世公开研讨会

### 运用 EXCEL 提升 HR 数据价值

#### 围绕人力资源管理情境，高效运用 EXCEL 管理、分析和展示数据

随着数据时代的到来，HR 数据分析成为所有 HR 专业的应知应会技能。Microsoft Excel 作为一个非常实用的工具，不仅能作为数据库来存储数据，还能作为软件，帮助专业人员比较和分析数据。在特定行业薪酬和人才测评调研数据中，Excel 技术也被广泛运用。

美世为期 1 天的研讨会将人力资源专业人员常用的 Excel 功能分成五个连续、真实并且完整的情景展开，逐层递进，围绕人力资源信息管理、薪酬福利、绩效、招聘、培训等一系列具体的工作中所用到的 excel 操作，以帮助学员理解并学会运用 Excel 强大的功能来管理、分析和展示数据，评估组织的劳动力状况，提升 HR 数据价值。

### 课程概述

#### 场景 1：初入江湖（功能导入）

管理情境：公司人员现有信息比较混乱，而且不同信息分散在不同的表格里，如何将所有信息进行高效整合

- 公式/函数入门
  - 函数的要素和本质
  - 从合同管理看各类时间函数
  - 从身份证号提取信息看基础数据函数、条件格式
  - \$的威力：学好一切 Excel 公式的基础
- 条件格式
- Vlookup-0、分位值等薪酬管理人员上班第一课

#### 场景 2：闷声发财（管好数据）

### 研讨会信息

时间地点：

北京

6 月 30 日

上海

5 月 19 日

12 月 17 日

广州

7 月 14 日

费用：

RMB 5,800(含 6%增值税)

### 联络

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## 美世公开研讨会

管理情境：公司为提升员工满意度，如何对每位员工按工龄增加工龄工资，梳理年假数据，并规范个人所得税

- Excel 高手首先是逻辑高手：把 IF 学透
- 六种不同的取整方式，都是 HR 计算必须掌握
- 不为人熟知的 Vlookup-1，有时候比 IF 好用
- 让数据快速呈现：高级筛选
- 让数据不出错：数据有效性、名称管理器、indirect 从一个简单的比赛看，Excel 的基础功能并不简单

### 场景 3：名声鹊起（归纳数据）

管理情境：公司人才多元化，如何做好人员结构分析，以对现有人力资源有充分的了解和有效的运用

- 各类统计函数综合应用
  - Sum, average, count
  - Sumif, averageif, countif
  - Sumifs, averageifs, countifs
- 数据透视表
  - 行字段、列字段、页字段等的功能及设定
  - 数据透视表的分组功能
  - 数据透视图及其联动
- 各类图表设计
  - 柱图、线图、堆积图
  - 薪酬架构图、薪酬趋势图、架构及散点综合图

### 场景 4：闭关苦修（呈现结果）

管理情境：如何在做好人员结构分析基础上，能够更好的展现结果，提升各种方案的可读性和通过率

- 饼图和 bar 图
- 双轴图、气泡图、雷达图
- 表格格式美化

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## 美世公开研讨会

- Excel 与 PPT/Word 之间的高效联动
- 邮件合并
- 多人协同的跨表引用、跨文件引用，不再担心数据的脱机脱节

### 场景 5：下山出关（持续成长）

管理情境：如何对各类文件的使用和后续的文件进行规范，应用标准化的人力资源表单

- 运用快捷键等提高长短期效率
- 做好 Excel 管理的常态习惯
- 常态化提高 Excel 技术的办法

## 学员收获

- 了解统计分析的基本知识和概念
- 熟练使用 Excel 各项常用功能
- 掌握逻辑化管理、分析及呈现数据的理念及常用办法
- 多方位使用 Excel 进行人力资源数据管理实战演练

## 目标学员

需要提高 Excel 技能的人力资源专业人员

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## APPLY EXCEL TO MAXIMIZE THE DATA VALUE OF HR

With the coming of the data age, HR data analysis has become a skill that all HR professions should learn and master. Microsoft Excel, as a very practical tool, not only can be used for storing data as a database, but also as software to help professionals compare and analyze data. In an industry-specific salary and talent evaluation survey, Excel technology was also widely applied.

In Mercer's one-day seminar, the frequently-used Excel functions of human resource professionals are divided into five continuous, real and complete scenarios, which were carried out step by step, focusing on human resources information management, compensation and benefits, performance, recruitment, training, etc., to help trainees understand and learn to use the powerful functions of Excel to manage, analyze and display data, evaluate the organizational labor conditions and enhance HR data value. In the learning form, Mercer's combined-type teaching model will be used to combine online and offline learning and effectively intensify and reinforce the learning effect.

## TOPICS COVERED

### Scene 1: Introduction

Scenario: The existing personnel information of company is scattered in different forms. How to integrate all the information efficiently?

- Getting started with formulas
  - The elements and essence of the formulas
  - Time-related formulas from contract management
  - Basic data formulas and conditional format by extracting information from the ID number
  - The power of \$: the basics of all Excel formulas
- Conditional Formatting
- First class of compensation specialist: Vlookup-0, and percentile formulas.

### Scene 2: Managing data

## WORKSHOP INFORMATION

Time and Place:

Beijing  
Jun 30

Shanghai  
May 19  
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Guangzhou  
Jul 14

Price:  
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Scenario: In order to improve employee satisfaction, how to make the calculation of tenure wages, annual leaves and personal income tax more accurate?

- Master of Excel should be Master of logic: IF formula
- Six different rounding methods, all of which must be mastered by HR
- Vlookup-1, which is not well known, is sometimes better than IF formula.
- Show results quickly: Advanced filter
- Keep data correct: data validity, names, indirect formulas
- a simple game: basic functions of Excel are not simple

## Scene 3: Inducing data

Scenario: With the diversification of company talents, how to do analysis on personnel structure, in order to have a full understanding and effective usage of existing human resources?

- Comprehensive application of various statistical functions
  - Sum, average, count
  - Sumif, averageif, countif
  - Sumifs, averageifs, countifs
- Pivot table
  - Setting of row, column, page, etc.
  - Pivot table grouping
  - Pivot map and its linkage
- Various graphic designs
  - Column chart, line chart, stacked chart
  - Compensation structure chart, salary trend chart, salary structure and scatter map

## Scene 4: Presenting results

Scenario: How to do a good job not only in analysis, but also in presenting the results in a better method?

- Pie chart and bar chart
- Biaxial chart, bubble chart, radar chart
- Table formatting
- Efficient linkage between Excel and PPT/Word
- Mail merge
- Multi-person collaborating

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- Cross-table quotation and cross-file quotation, no need to worry about going off-line and the disconnection of data

## Scene 5: Continuous growth

Scenario: How to standardize the use of various documents, and to apply standardized forms in HR management?

- Improve long-term and short-term efficiency with shortcut
- Develop excel management as a normal habit
- Normalization method to improve Excel technology

## BENEFITS TO PARTICIPANTS

- Understand the basic knowledge and concept of statistical analysis
- Skillfully use various frequently used functions of Excel
- Master logical management and analyze and present data concepts and common methods
- Comprehensively use Excel to conduct HR data management drills

## TARGET PARTICIPANTS

HR professionals who need to improve Excel skills

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